

To: RGMs From: Bruce McNiven  
c.c. J Main  
RLMs  
T Rollason Date: 7th January 1999  
Re: Horizon Training

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Training courses for 64,000 of the 72,000 target audience have been agreed in principle. This includes the Managers Course which will be aimed at branch managers and subpostmasters, together with other staff who complete the Cash Account; and the basic training course for sub office assistants. Currently however we have not reached agreement on how to deliver training to an estimated audience of approx. 8,000 comprising at least 6,500 counter clerks and upwards of 1600 franchise staff who operate ECCO +.

Clearly, the training is not aimed at teaching people how to complete a Cash Account which is an assumed competence of those attending the courses, but the conversion to the automated version is more complex than originally envisaged. The gap is approximately two hours of training which cannot be added to the one day event.

The design of the courses is modular and because of this, it would be possible to take some elements of the training out of the standard day. The two prime contenders for this are either the Stock Unit Balancing module itself or the Benefit Encashment module which trains people in the basics of the card payment. Alternatively, it would be possible to send the audience of 8,000 on the managers course but this carries other attendant issues.

We are currently looking at four options, all of which have varying degrees of operational impact. These are;

**Option 1** Attendance of the 8,000 stock unit holders at the 1.5 days Managers Course.  
This proposal exceeds our requirement but it will obviously provide POCL with better trained staff at our main outlets. It also provides clean training inasmuch as all the outlets will have completed training within the five day training window. Operationally, however, there may be difficulties in releasing staff or having sufficient staff to backfill absences. Impact on customer service for that week will be an issue.

The backfill costs are covered in the Horizon training budget for the provision of a one day course but there is no current provision for an additional days attendance. This cost is estimated as £325k.

Option 2 The 8,000 individuals would attend a one day course which would include Stock Unit Balancing but not the card payment modules. The proposal to deliver this module would be to use CTOs on a Sunday and carryout the training using POCL trainers. There is effectively a four week window between an office going live and the first impact of card payments when this training could be completed. The estimated cost of this option is £1m.

Option 3 As above but with staff being released during office hours to attend their training at a local CTO, again delivered by POCL trainers. The estimated cost of this option is £270k.

Option 4 To provide a POCL trainer in the office and deliver on-site training. This option is more cost effective but also more time consuming as staff are released in small batches from the counter. The cost of this option would be the dedicated trainer time of £250k.

It may well prove that no single solution is appropriate and that there would have to be a mix and match requirement, dependent on local circumstances but this would make the logistics complex.

It is important this issue is brought to a conclusion before the end of January. We are in discussion at the moment with Pathway about the commercial agreements which would provide the financial headroom for any of these solutions. However, in order to plan successfully for delivery, we need to define our preferred approach.

I would like a response based on operational impacts, by Friday 15<sup>th</sup> January. These are clearly complex issues and although RLMs are reasonably up to speed on the implications, we are arranging a meeting for them to bring them completely up to speed in order to support regional discussions.

Regards

Bruce McNiven